



The Ultimate Buyer's Guide For Automation Platforms



THE ULTIMATE

Buyer's Guide For Automation Platforms



Shopping for automation software can be overwhelming. In Tonkean's State of Operations report, 87% of respondents agreed that automation was becoming "more important" to their company's operations. But there are lots of options available on the market, and many vendors make similar promises. How can you know you're choosing the right tool—and making the right investment—for your organization's unique needs?

The truth is, the automation platforms available today differ greatly in terms both of functionality and effect. Most are relatively specific in scope. And each comes with different requirements, so far as implementation and effective use. To ensure you choose the right platform for your needs, you have to educate yourself on the landscape and reflect internally on your implementation goals (do you want to better orchestrate processes, or automate individual tasks?).

You'll also need to take honest stock of your capacity for implementing and

supporting automation technology; many automation tools necessitate more regular tech support and management than you might think. Those that market themselves as "low-code", for example, are only accessible by users who already know how to code. Certain automation tools, like RPA, often require entire tech teams dedicated just to that tool.

In this Automation Buyer's Guide, we'll walk you through what the automation landscape looks like today—which tools do what; the limitations of each platform type; etc.—and we'll review what questions you should be asking internally before turning to the market, so that your implementation efforts are ultimately successful. Because to truly realize the potential of automation software—to use it in a way that actually increases efficiency, lower costs, or minimizes change management, among other things—you need to apply the right solutions in the right situations.

Let's get started.

CHAPTER 1

The 4 Types of Automation Platforms



01 / RPA

What RPA is designed to do



Robotic Process Automation platforms (RPA) allow companies to automate previously un-automatable tasks on legacy systems or with unstructured data.



More specifically, RPA platforms utilize software robots, AKA bots, to automate routine tasks within software applications that are normally done by humans. Companies are most successful when these tasks are manual, human-to-system tasks, such as transferring data stored on forms into digital systems. This also includes structured and unstructured data, such as data collected through chat or voice message, as well as spreadsheets and documents.



RPA bots can also be used to automate tasks on top of hard-to-integrate systems—i.e. systems without APIs—which are handled today by human inputs.

What RPA is not designed to do



While most RPA platforms can handle integrations via APIs, this is not what they were really built for. They miss many capabilities (such as out-of-the-box connectors) that will make API-centric integrations difficult to implement and maintain. Their value comes from helping you solve challenges with systems for which there can be no APIs—which is to say, legacy systems. This makes RPA less applicable to modern SaaS applications. APIs, in comparison, for example, are a faster and more consistent means of automating system-level tasks or workflows.



RPA cannot be used to create completely net new apps or solutions for business users.



And RPA bots are likewise not designed to facilitate dynamic or complex business processes end-to-end—only specific tasks or routine workflows.



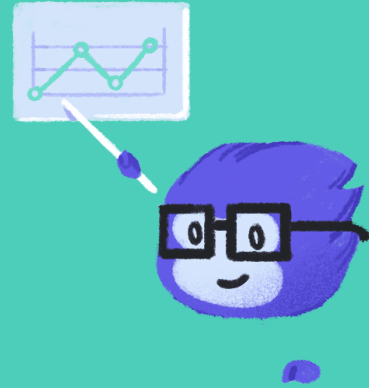
RPA bots cannot maintain state. Contextual data must be maintained in a central database or underlying system. This makes it difficult for RPA to facilitate processes that run over a longer period of time, say, days or weeks. Instead, bots are used to automate certain pieces of the process, and the hostlic process logic must be kept outside of the RPA platform.



RPA is not designed for non-technical developers. You need to be trained as an RPA developer to conduct complex automations with RPA.

02 / IPAAS

What iPaaS is designed to do



iPaaS—or, Integration Platform as a Service—is a category of automation solution composed of platforms designed to connect and integrate typically siloed SaaS apps, tools, or on-premise systems so that they can be accessed across departments and environments.



iPaaS tools are useful for moving data from system A to system B with “triggering” events that can be added to and supplement business logic.



Via APIs, they likewise allow users to more easily create, update, or delete data across data systems. This can cut down on the need for manual and redundant cross-system data entry and upkeep, as it can reduce the risk of data inconsistency.



What iPaaS is not designed to do



iPaaS solutions cannot be used to build or create net-new applications or to facilitate heavy people-centric processes that don't involve moving data across systems—such as email-based workflows.



iPaaS solutions typically cannot maintain state. Thus, they don't manage processes that are long-standing, instead relying on the underlying systems they are connecting to manage statuses and context.



They don't have robust capabilities for processing unstructured data like emails or documents, and also typically cannot connect to systems without APIs.



iPaaS tools are ultimately built for point-to-point data movement. They feature large libraries of integrations, along with the capacity to build custom APIs, but aren't designed to handle end-to-end business processes—at least not without custom code.

03 / IBPM

What iBPM is designed to do



iBPM is short for Intelligent Business Process Management, which can be defined as the designing, mapping, execution, and management of business processes. In practice these tools allow you to do things like draw out a process diagram, flesh out a checklist of items involved in the process, and build an app to execute processes.



Many iBPM platforms are also offering low-code capabilities that accelerate how quickly developers can deliver solutions and offer some participation from business stakeholders in the building process.



What iBPM is not designed to do.



Although some iBPM platforms are adding RPA and integration capabilities, by and large iBPM platforms have a relatively limited ability connecting or integrating with existing systems. What integration capabilities they do have require technical resources or developers to implement and manage, generally.



This means that iBPM tools require users to adopt a new system in order to automate a workflow. This creates difficulties in cross-departmental, cross-system type processes because it requires different teams to adopt a new system, creating significant change management for both technical and business teams.

Take the process of handling new contracts. A company might try to build a forms-based workflow using their iBPM platform to help their legal team manage this process atop, say, their matter management system. However, this ultimately requires other parties that request contracts, like sales, HR, finance, etc., to also adopt this app to request and manage legal contracts. This not only creates complexity of data—you want to tie contracts to CRM records—but also complexity for people, who now need to navigate to yet another system to get work done.



Ultimately, iBPMS platforms are built for instances when there is a need for net new applications to provide a system of record for processes. However, you should not be looking at iBPMS platforms when you want to automate processes without adding new tools.

04 / PROCESS ORCHESTRATION PLATFORMS

What process orchestrations platforms were designed to do and why they're different



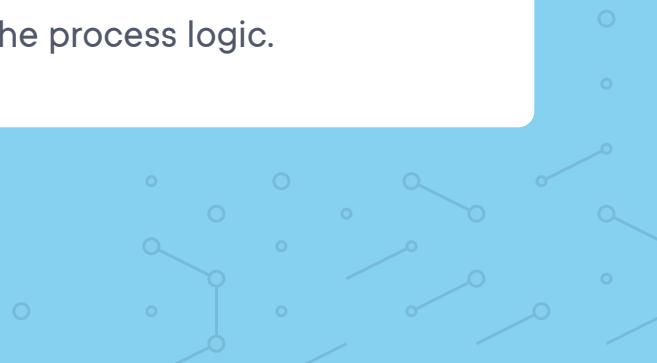
Process orchestrations platforms sit a layer above automation solutions to orchestrate—meaning, execute, monitor, and manage—entire business processes.



In effect, these tools help to facilitate entire business processes across systems and teams, making sure that the right action is taken at the right time, whether that's updating a system or following up with a person, and managing items throughout the lifecycle of the process.



While process orchestration platforms combine elements of other automation platforms, they aren't focused on building net new apps (like iPaaS platforms) or automating specific tasks (like RPA). Since process orchestration platforms come with native connectors and capabilities like OCR and NLP, they can be used to handle business processes standalone, but they can also be used in conjunction with other automation platforms to add more flexibility in defining and managing the process logic.



04 / PROCESS ORCHESTRATION PLATFORMS



Historically, process orchestration platforms have been more IT-centric, but with advancements in no-code/low-code technology, more and more users are able to access and manage them, in effect democratizing who inside the enterprise is able to leverage automation technology to drive outcomes and increase efficiencies. No longer is that ability—or responsibility—limited to technology teams. In this sense, processes orchestration act like operating systems for business operations teams.



This is a boon for enterprise companies, because it better empowers with technical creativity the business users who possess the most intimate on-the-ground knowledge of the problems we use technology to solve. That's a much smarter way to manage and optimize business logic—without, again, introducing yet another app or requiring users to change behavior—as it's an exponentially more powerful means of business enablement.



CHAPTER / 02

What To Ask Before You Buy





What To Ask Before You Buy

Now that you know a little more about each of the options, let's dive into what you'll need to consider as you choose an automation platform. What platform is right for you will depend on your needs.

The weight you give to any one point will depend on your company and its unique needs. However, this should give you an idea of whether a specific platform may be right for you.

1 Tasks or processes?

The first questions to ask is, "Are we automating tasks or processes?" In other words, do you want to automate specific, repetitive, manual actions (like data entry) or the movement of data from one system to another?

These are the types of actions that RPA bots or iPaaS workflows are often used to automate.

A business process, on the other hand, is an accumulation of multiple tasks over a longer period of time that typically implicate and depend on multiple systems, stakeholders, and functions. These are inherently trickier to successfully automate, and if you choose a platform that works best for automating tasks, you'll still be left to complete on your own all the "in-between" steps that compose the larger process. Those in-between steps? They're expensive, a waste of much time and energy.

2 How are you hoping to use the tool?

Most automation tools available purport to do everything you might think an automation tool should do, but in reality, each tends to only do one or two things genuinely well. If you're in the market for a tool to help you automate data entry across different data systems, for example, iBPM will likely only disappoint you. So it pays to be purposeful from the jump.

Here are a few iterations of how this reflection might help you:

Are you trying to deliver (and use!) a new application that automates simple processes you currently do manually? If so, **iBPM** is a good fit.

Or are you trying to integrate your existing applications to ensure data in one system can be moved automatically to other systems? If so, **iPaas** is solid.

Do you want to do both of these things—and do you want business users to be the ones to manage it all? Then **process orchestration** is what you'll need.



3 Do you need a no-code interface, or can you handle low-code?

Despite what the names suggest, there is actually quite a large difference between no-code platforms and low-code functionality. Simply put, no-code platforms are accessible by nontechnical teams. The latter is not; they require coding knowledge in order to use.

RPA is an extreme example of that latter category. While RPA platforms don't require code for simple use cases, to use it successfully across a wider range of processes, those leading implementation efforts will need to be technical. Nontechnical users won't be able to get their usage off the ground at all.

If you need or hope for nontechnical users to be the ones using the automation tool to solve problems, increase efficiencies, and use their unique expertise and experience to improve business logic, you'll need a tool with no-code, drag-and-drop functionality.

If the platform will only be used by IT, then a **no-code platform** may be unnecessary.



4 How extensible is the platform?

Questions of extensibility come down to control.

How much customization do you want? Do you need control over the business logic? Do you need control over which systems the platform “talks” to?

Generally speaking, a no-code platform will be less extensible than a low-code platform. That’s because no-code platforms cater to business teams, and those employees generally lack the technical know-how to code. Which isn’t necessarily a bad thing—that’s the whole point of a no-code platform. But if a company wants to add new data connections or custom actions, that requires code, and the business-side users of a no-code platform won’t be able to handle that.

On the other hand, low-code platforms provide more extensibility because they are built with IT teams in mind. When a new connection or custom action is required, the IT team can readily add them.

The exception here, we should note, is a platform like Tonkean, which is a process orchestration platform that was built for both the business and IT. Tonkean was designed to empower IT to deliver reusable building blocks which the business can use to compose their own custom workflows. These building blocks can facilitate integrations to 1000+ enterprise systems; extend custom applications; process unstructured data (like emails, chat, documents, etc.) using NLP and OCR; facilitate people coordination, and more.

Most importantly, they allow a way to extend capabilities that normally require custom coding with a dedicated development team to more areas of the business, while maintaining security and compliance.

5

How important is a good governance structure?

In most enterprises, the task of governing the company data and tech stack falls onto IT. This is a demanding job, especially because IT also needs to work to enable the business to act fast and innovate, typically by either buying business users a new app, or custom building one for them.

The issue here is new solutions—automation tools very much included—further convolute the tech stack, and compromise IT's ability to effectively govern company data, protect your company from risk, and manage your operational infrastructure.

If this is already an issue for you, you'll need whatever automation solutions you use to empower the business while at the same time respecting the importance of IT governance.

Of course, not all automation tools—especially those that allow the business to build net new apps—do.

What you should be looking for, in this case, is a tool that provides users the benefits of automation, but that keeps IT in the loop and doesn't create shadow IT or technical debt. That generally means solutions that have been built with enterprises in mind.

6

Does it scale?

If the automation tool you're looking at is hard to use, or creates bottlenecks—meaning, tech teams are solely responsible for managing them and supporting their use, as is the case with RPA bots—it might not be the best fit for you, at least if scalability is something you want, or if scalability is at least as important to you as extensibility, which is something more technically demanding tools provide.

Automation platforms that are accessible by nontechnical users, on the other hand—such as process orchestration platforms or iPBM—can dismantle those bottlenecks, even if, as is the case with iPBM, they sacrifice extensibility.

BOTTOM LINE

When shopping for automation technology, it's critical to understand what you need or want to get out of the tool.

If you follow the kind of guided self-reflection above, you'll likewise begin to understand what won't work for you.

That knowledge will help you narrow your options. Automation platforms are complex, but their benefits and drawbacks should become clear once you start digging.



CHAPTER / 03

What Makes Tonkean Different



What Makes Tonkean Different



Putting people first and bridging the gap.

Now that you understand the different uses for each type of automation platform, you can likely see how each is best deployed at different times and for specific purposes. What should also be clear, however, is that certain process orchestration platforms—such as Tonkean, which is a process orchestration platform designed to orchestrate complex processes end-to-end—transcend those differences. And one reason is they appreciate the importance of a key element that every other automation solution sort of glosses over, which is **people**.

While automating system-to-system connections with iPaaS, building net new apps with iBPM platforms, or

eliminating repetitive manual tasks with RPA all make processes more efficient, none of those actions truly optimize processes end-to-end, because they don't appreciate the operational importance of people—who play in fact the most important role in every key business process.


iPaaS platforms don't solve how data moves from people to systems to begin with. iBPM platforms have a similar challenge. (Introducing net new interfaces requires people to learn how to use those new interfaces, which itself requires costly change management and education.) RPA platforms, meanwhile, focus on reducing manual human dependency in processes, but do little to actually help people get more out of their enterprise systems.

At Tonkean, we believe that when strategizing around how to implement automation solutions, enterprises must think first and foremost about the impact those solutions will have on your people. (We've even codified a framework for building processes around people; it's called **People-First Process Design**.) What good is an automation platform, really, if it doesn't genuinely enable or empower your users? At the very least, that's leaving a ton of potential value on the table.

That's why we designed Tonkean with people in mind—and to allow enterprise companies a way to empower their users in previously unthinkable ways. That is, Tonkean's no-code process orchestration platform not only liberates business users from mundane work, but empowers them to be technically creative and to in turn leverage the power of software, even if they don't know how to code.

For many companies, the right platform is difficult to find because none of the traditional answers—RPA, iPaaS, or BPM platforms—get both liberation and empowerment right. But Tonkean incorporates key elements of all different kinds of automation platforms to crack that code. That's why we refer to Tonkean as more of an operating system: for process orchestration, systems integration, and for safe, IT-governed citizen development.

That last point is important. Key to putting people first is removing their barriers to success. In the enterprise, that means solving for the technology gaps and bottlenecks that our convoluted tech stacks and app-first operational strategies perpetuate. At Tonkean, we've thought long and hard about how to do that. Much of the task can be boiled down to one general imperative: **bridging the gap between IT and the business.**



Many of the problems preventing companies from truly putting people first are a product of limitations imposed upon the business and IT. See, IT needs to enable the business, but it also needs to govern the tech stack. The business, meanwhile, needs to move fast, while helping IT maintain their governance. The problem is, in the enterprise today, neither side has what they need to do that. IT, specifically, lacks either the resources or the bandwidth needed to enable the business effectively, in a manner that would actually put people first. When the business needs a solution, for example, IT has two options: 1) Buy packaged, task-specific apps for the business (certain automation solutions very much included) or 2) Develop custom solutions themselves.

Both options are inadequate. Custom solutions regularly take 6-9 months (or more!) to build. And as we've seen, apps—as well as most automation solutions—aren't capable of improving processes holistically. Which is what removing bottlenecks, bridging technology gaps, and putting people first requires.

Tonkean gives enterprises a third option. A way to finally, truly put people first and bridge the chasm between IT and the business.

It does this by enabling the business to innovate and problem-solve on their own, while preserving IT's governance over the tech stack.

There are two tools inside Tonkean that work to this end that are worth highlighting. The first is **Enterprise Components**. Enterprise Components are designed to empower IT to deliver reusable building blocks which the business can use to compose their own custom workflows. These building blocks can facilitate integrations to 1000+ enterprise systems; extend custom applications; process unstructured data (like emails, chat, documents, etc.) using NLP and OCR; facilitate people coordination, and more.

Most importantly, they allow a way to extend capabilities that normally require custom coding with a dedicated development team to more areas of the business, while maintaining security and compliance. You can think of built Enterprise Components as a way to package and democratize APIs and other business capabilities. Like APIs, tech teams maintain governance over them. But, unlike traditional APIs, they're accessible across teams, processes, and functions.

Business teams access Enterprise Components via our no-code **Solutions Studio**—a business logic modeling layer for building complex, cross-functional processes. Here, business teams building process solutions can make sure they're following best practices with versioning, environments, release management, and more.

Taken together, these suites provide for the enterprise what is in effect an operating system for process orchestration, systems integration, and safe citizen development. It's an operating system, in other words, for finally bridging the business and IT, facilitating genuinely powerful business enablement, and addressing this seemingly un-addressable problem of inefficiency in large organizations.

We believe that to be automation technology's true promise—to finally solve problems; to both liberate and empower. To create a new operational standard to allow for efficiency gains and optimization not incrementally, but holistically, and at scale, across the entire enterprise.

No other automation platform that we know of does the same.

[Visit Tonkean.com](https://www.tonkean.com)

